CallPilot End-User Installation Instructions

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Administrator's Overview

As the administrator, you can use all or part of this file to help your end-users install CallPilot.

Post all or some of the following sections on your network, where it can be downloaded as the instructions for installing CallPilot on a PC. Once a user successfully installs CallPilot, refer him or her to the online Help menu for more detailed information on using CallPilot.

For WindowsNT, Groupwise, Lotus Notes and Microsoft Outlook, users must have administrative priviledge to install CallPilot. If GroupWise or Exchange/Outlook users then log on as a regular user, they must manually add CallPilot to their mail profile.

For the administrator installation, make sure you follow the initial setup instructions as found in Chapter 3 of the *Desktop Messaging Software Installation and Maintenance* guide. This chapter describes how to use inisetup.exe. Inisetup.exe creates site-specific default settings for the ease of your end-user's installation.

In general, for detailed administrator information, see the *Desktop Messaging Software Installation and Maintenance* guide and the online Help.

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Installing CallPilot on your PC

Information you need

the location of the Desktop Messaging setup.exe file

CallPilot server settings information available:

- the fully qualified domain name (FQDN) of the CallPilot server (or the CallPilot server CLAN IP address, if you do not have a DNS server)_____
- the SMTP/VPIM prefix of the CallPilot server_____
- the CallPilot Search Base _____

Before you begin

Close all Windows applications that are running so Desktop Messaging can be installed successfully.

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Administrator - choose one of the following two options for your end-users to follow.

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To install from a network drive

There are two ways to run the setup.exe file from your computer.

1) From the Windows Start menu, select Run.

Type in or browse to the location of the setup.exe file.

Use Network Neighborhood to go to the appropriate drive and folder where the setup.exe file is located.

Select the setup.exe file.

Click OK.

The setup program starts and the Welcome window appears.

or

2) Map a network drive to the location of the setup file.

From your PC desktop, select My Computer and click the right mouse button.

On the Map Network Drive dialog box, enter the path name to go to the file where the setup.exe file is located.

Click OK.

From My Computer, select the mapped network drive where the setup.exe file is located.

Browse and select the setup.exe file.

Click OK.

The setup program starts and the Welcome window appears.

When the Welcome window appears

1) Click Next to continue the installation.

2) When the Select Type of E-Mail Client screen appears, click the appropriate check boxes beside the e-mail clients that you are using.

   The Internet Mail clients include Microsoft Outlook Express, Microsoft Outlook (in Internet mail mode, Netscape Messenger, and Qualcomm Eudora Pro. You can select more than one e-mail client.

3) Click Next. The Select Destination Folder screen appears.

4) Accept the default directory by clicking Next. Or, click Browse to view other destination folders, and select the folder in which you want to install Desktop Messaging. Nortel Networks recommends that you install CallPilot in the default folder. Click OK.

5) Click Next. The CallPilot Mailbox Number screen appears.

6) On the CallPilot Mailbox Number screen, enter your mailbox number (usually your telephone extension).

7) Click Next.

8) On the CallPilot Server Settings screen, if the screen appears with no information in the fields, enter the following information after the field names:

   Server Name or IP Address: The fully qualified domain name (FQDN) of the CallPilot server.

   SMTP/VPIM prefix: The SMTP/VPIM prefix of the CallPilot user's address. This is the string of digits that is linked with the mailbox to form the address.

   Search Base to be used for address searches: The search base is the directory tree root for the part of your company or organization served by the CallPilot server. It should match the directory tree root configured on the server. For example, for a CallPilot server used by Nortel Networks in Toronto with an FQDN of CallPilot@toronto.nortelnetworks.ca, the search base is dc=toronto,dc=nortelnetworks,dc=com.

9) Click Next. The Ready to Install screen appears.

10) If you want to install the fax printer driver, check the Install Fax Printer Driver check box. This driver enables you to save any document in TIFF-F. You can then send the file as a fax to other CallPilot users. Ensure the Configure Exchange/Outlook Services check box is checked.

12) Click Next. The installation progress bar appears and indicates the files that are being copied.

13) Click Finish to complete the installation.

To use the fax driver

The fax driver can be used after installing one or more of the available clients.

Requirements to view and manipulate faxes

To send and receive faxes on a PC, you must install Imaging for Windows.

To verify whether Imaging for Windows is already installed, from the Windows Start menu click Programs > Accessories > Graphics Tools > Imaging.

If Imaging for Windows is not installed, you can install it from the Desktop Messaging CD, available from your system administrator.

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Imaging for Windows comes preinstalled on Window 95B, Windows98, WindowsNT, and Windows2000 operating systems.

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The next few headings provide list options for the various e-mail clients. Delete any which do not apply to your site or users.

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Microsoft Outlook configuration options

Configure your CallPilot Inbox to contain either CallPilot messages or contain both Microsoft Exchange e-mail and CallPilot messages. The default configuration is to store only CallPilot messages in the CallPilot Inbox and leave e-mail messages on the Exchange server.

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You can configure the CallPilot Inbox to store e-mail messages by making it the default message store. Under Tool>Services>Delivery, set the 'Deliver new mail to the following location:' to the CallPilot Transport. This moves all e-mail messages to the CallPilot Inbox on your desktop. These messages will no longer reside on the Exchange server.
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Once installation of Desktop Messaging is completed, you can start your e-mail client and log on to Desktop Messaging to view your messages. For more information, refer to the online Help available from the Help menu within the client.

Novell GroupWise configuration options

Note: Novell GroupWise 5.5 requires that Windows Messaging 4.0 is installed on the user's PC. This is normally the case when Windows is installed on a PC. However, in the case where Windows Messaging 4.0 is not installed, the GroupWise installation provides you with the following options:
1. Install the complete Windows Messaging system.
2. Leave Windows Messaging as is.

Choose option 1, otherwise, the GroupWise CallPilot Desktop Client is dimmed.

CallPilot Message Store

When installing CallPilot Desktop Messaging for GroupWise, the CallPilot Desktop install process adds a folder to the your GroupWise mailbox on the GroupWise Server.

If you do not use the following procedure to remove CallPilot from GroupWise, the CallPilot Message Store might remain visible. This can be confusing.

To remove CallPilot from GroupWise, you must remove CallPilot explicitly by using the Add/Remove Programs in the Control Panel.

Once installation of Desktop Messaging is completed, you can start your e-mail client and log on to Desktop Messaging to view your messages. For more information, refer to the online Help available from the Help menu within the client.

Lotus Notes configuration options

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Users must have Manager or Designer access control of their mail database to install the CallPilot Desktop Messaging client for Lotus Notes. This control is set on the server by the Lotus Notes administrator for each user. Users without this access level must either be granted this access level while they install the desktop software, or the administrator can update the user's mail database from the server using the Update Database Design tool.

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The CallPilot address book can be downloaded to each Lotus Notes client. Optionally, the CallPilot address book can be installed once on the Lotus Notes server and accessed from each client. From the Server directory of the CallPilot Desktop Messaging cd, run setup.exe. This will install both the CallPilot address book and the Update Database Design Tool. If you don't need to update each use'rs database (typically this only needs to be done for users without Manager or Designer access control), you do not need to follow any further instructions to successfully install and run CallPilot.

From the Windows' Start menu

1) Select Program Files\Nortel Networks CallPilot Desktop Messaging\Update Database Design
2) Choose 'Add CallPilot Components' and click OK.
3) In the Select Database(s) dialog, go to the mail directory and choose the users whose Mail databases should be updated for CallPilot.
4) Choose OK when finished.

To remove CallPilot information from the Databases:

1) Choose \Program Files\Nortel Networks CallPilot Desktop Messaging\Update Database Design
2) Choose 'Remove CallPilot Components' and press OK.
3) In the Select Database(s) dialog, navigate to the mail directory and choose the users whose Mail templates should be updated.
4) Choose OK when finished.

Updating the Mail database design manually

Nortel Networks recommends selecting the "Update Lotus Notes Databases" during installation, which creates a separate view for CallPilot messages.

Replace the Mail database design only if the Lotus Notes Mail database has not been customized and you prefer to have CallPilot messages appear in the same Inbox as your e-mail messages. Updating the database manually causes you to lose any previous customization of your Lotus Notes Inbox.

To update the Mail database design manually

1) Start and log on to Lotus Notes.
2) Make a note of the version of Lotus Notes. From the Help menu, select About Notes Desktop.
3) Click the Mail database (the database with your name and the envelope icon).
4) On the File menu, click Database, and then click Replace Design.

Note: The Mail database design determines which messages appear in your Lotus Notes message list. When you update the design, it changes your database so that CallPilot messages also appear in your message list. If you have the Update Lotus Notes Databases check box selected during installation, then there is nothing else to do. However, if you want CallPilot messages and e-mail messages in the same folder, you should uncheck the Update Lotus Notes Databases check box during installation.

5) In the Replace Database Design dialog box, select Template Server.
6) In the Template Server window, select Local.
7) Click OK. Make sure that the Show advanced templates check box is checked.
8) Select CallPilot Mail (R4.5), CallPilot Mail (R4.6) or CallPilot Mail (R5.0) from the list. Your selection depends on which version of the Lotus Notes client you are running.
9) Click Replace. The system asks you to confirm that you want to change a database's view.
10) Click Yes.

Once installation of Desktop Messaging is completed, you can start your e-mail client and log on to Desktop Messaging to view your messages. For more information, refer to the online Help available from the Help menu within the client.

Internet Mail Clients configuration options

CallPilot Desktop Messaging supports the following Internet mail clients:

- Outlook Express
- Outlook (in Internet mail mode)
- Netscape Messenger
- Eudora Pro

Note: Netscape Messenger versions prior to 4.5 are incompatible with CallPilot Desktop Messaging.

Information you need

the fully qualified domain name or CLAN IP address of the CallPilot server

your CallPilot mailbox number and password

the SMTP/VPIM prefix of the CallPilot server

the search base to use for address searches in the CallPilot directory

Configuring Outlook Express or Outlook (in Internet Mail mode)

1) From the menu bar on the main screen, select Tools > Accounts > Mail.

2) Select the Add button and click on the Mail option. The Internet Connection Wizard starts up.

3) Type your name in the Display name box, and then click Next. The Internet Connection Wizard - Internet E-mail Address screen appears.

4) Type your CallPilot mail address in the E-mail address box, and then click Next.

   Your e-mail address should be in the form
   <SMTP/VPIM prefix><mailbox number>@<local CallPilot server>.

   Example: 14165556003@voiceserver.ca.result.com

   where: 1416555 is the SMTP/VPIM prefix

   6003 is your CallPilot mailbox number

   voiceserver.ca.result.com is the fully qualified domain name of the CallPilot server

5) Choose IMAP as the incoming mail server type.

6) Click Next. The Internet Mail Logon screen appears with your IMAP account name already entered.

7) Type your CallPilot mailbox password in the Password box. Do not check the Log on using Secure Password Authentication (SPA) box.

8) Click Next. The Internet Connection Wizard - Friendly Name screen appears.

9) Type an easily recognizable name for your CallPilot IMAP account in the Internet mail account name box. Type in your first name or full name, or a name that identifies the purpose of the account.

10) Click Next. The Internet Connection Wizard - Choose Connection Type screen appears.

11) Choose the connection type between your PC and your CallPilot server.

12) Click Next. The Internet Connection Wizard - Congratulations screen appears.

13) Click Finish. The Outlook Express screen appears.

14) Select Yes to download the folder list for the IMAP account that you just created. Select No if you do not want to download the folder list at this time.

15) To make changes to your new IMAP account, select the account name and click Properties to display the Properties page.

16) Click Close.

To configure an LDAP directory service for Outlook Express or Outlook

1) From the menu bar on the main screen, select Tools > Accounts > Directory Service.

2) Click the Add button and select the Directory Service option. The Internet Connection Wizard starts up and the following screen appears.

3) Type the fully qualified domain name of the CallPilot server into the Internet directory (LDAP) server box. Do not check the My LDAP server requires me to log on box.

4) Click Next. The Internet Connection Wizard - Check E-mail Addresses screen appears.

5) If you want to check for addresses in the CallPilot LDAP directory when addressing messages, click Yes; otherwise, click No.

6) Click Next. The Internet Connection Wizard - Friendly Name screen appears.

7) Type an easily recognizable name for your CallPilot directory service in the Internet directory service name box. Type a name that helps you to recognize the type of information in the directory.

8) Click Next. The Internet Connection Wizard - Congratulations screen appears.

9) Click Finish. The Internet Accounts screen appears.

10) Click Properties, and then click the Advanced tab.

11) If your CallPilot server has SSL enabled and you want to use this option for directory searches, place a check mark in the This server requires a secure connection (SSL) box.

12) If your network is slow, move the slide bar under Search timeout toward Long to increase the timeout.

13) If you expect to do directory searches that return more matches than the number shown, increase the number in the Maximum number of matches to return box.

14) Type the search base for the CallPilot directory in the Search base box.

15) Click OK. The Directory Service screen appears again.

16) If you choose to check for addresses in the CallPilot LDAP directory, click Set Order. The Directory Services Order screen appears. If necessary, use the Move Up or Move Down buttons to position the CallPilot LDAP directory in the search order.

17) Click OK. The Directory service screen appears.

18) Click Close.

To configure special settings for Outlook Express or Outlook (Internet Mail mode)

If you are using Outlook Express, check the following settings:

1) From the menu bar on the main screen, select Tools, and then click Options from the pull-down menu.

2) Click the Send tab. The Options screen appears.

3) Under Mail sending format, select Plain Text.

4) Click the Settings button beside Plain Text.

5) Under Message format, select MIME.

6) Under Encode text using, select None.

7) Click OK. The Options Send tab appears.

8) Click OK.

If you are using Outlook 98, check the following settings:

1) From the menu bar on the main screen, select Tools, and then click Options from the pull-down menu.

2) Click the Mail Format tab.

3) Under Send in this message format, select Plain Text.

4) Click OK.

5) If you add addresses from the CallPilot LDAP directory to your Outlook Express or Outlook 98 personal address book, check the following setting:

   a) Select the recipient name in the personal address book, and right-click on it. From the pop-up menu, select Properties, and then select the Personal tab.

   b) The Properties screen appears.

   c) Place a check mark in the box for Send E-Mail using plain text only.

To test the Outlook Express or Outlook (Internet Mail mode) IMAP account

Use your telephone to log on to your CallPilot mailbox.

Compose a test voice message and send it to yourself.

For more information, refer to the online Help available from the Help menu within the client.

Configuring Netscape Messenger

If you are using Netscape with POP for e-mail, Netscape cannot be configured with IMAP at the same time. You must set up a different Netscape user profile.

If you are already using Netscape for e-mail, Netscape cannot be configured to send mail to CallPilot, since only one SMTP server can be configured. You must set up a different Netscape user profile.

You need Netscape Messenger 4.5 or above. Netscape Messenger versions prior to 4.5 are incompatible with CallPilot Desktop Messaging.

To configure an IMAP account on Netscape Messenger

1) From the menu bar on the main screen, select Edit, and then, from the pull-down menu, click Preferences.

2) In the Mail & Newsgroups category, select Identity. The Preferences screen appears.

3) Type your name and CallPilot mail address in the first two boxes.

   Your e-mail address should be in the form
   <SMTP/VPIM prefix><mailbox number>@<local CallPilot server>.
   Example: 198887002@voiceuser.factor.com

   where 19888 is the SMTP/VPIM prefix

   7002 is your CallPilot mailbox number

   voiceuser.factor.com is the fully qualified domain name of the CallPilot server

4) In the Mail & Newsgroups category, select Mail Servers. The Preferences screen appears.

5) Click the Add button so that the Mail servers properties dialog box appears. Select the General tab if it is not already selected. Type the fully qualified domain name of the CallPilot server in the Server Name box.

6) Type the part of your CallPilot mail address to the left of the @ sign in the User Name box.

7) Set the frequency that you want Netscape Messenger to check for new messages in the Check for mail every ___ minutes box.

8) Select the IMAP tab.

9) If your CallPilot server has SSL enabled and you want to use this option, check the Use secure connection (SSL) box.

10) Under When I delete a message, choose Mark it as deleted.

11) Check the Clean up ("Expunge") Inbox on exit box.

12) Click OK. The Mail Servers screen returns.

13) Type the fully qualified domain name of the CallPilot server in the Outgoing mail (SMTP) server box.

14) Type the part of your CallPilot mail address to the left of the @ sign in the Outgoing mail server user name box.

15) In the Mail & Newsgroups category, select Addressing.

16) Under Pinpoint Addressing, check both Address Books and Directory Server.

17) In the Mail & Newsgroups category, select Messages.

18) Under Forwarding and Replying to Messages, By default, forward messages:, select As Attachment.

19) Under Send messages that use 8-bit characters, choose Using the "quoted printable" MIME encoding.

20) In the Mail & Newsgroups category, select Copies and Folders.

21) Deselect Create a new folder on my IMAP server.

22) Clear all boxes.

23) In the Mail & Newsgroups category, select Formatting.

24) Under Message formatting, choose Use the plain text editor to compose messages.

25) In the Mail & Newsgroups category, select Return Receipts.

26) Under If I request a receipt when sending a message, I want, choose A delivery receipt from the receiving server (DSN).

27) Under When a receipt arrives, choose Leave it in my Inbox.

28) Click OK.

To configure an LDAP directory service for Netscape Messenger

1) From the menu bar on the main screen, select Communicator. Then, from the pull-down menu, click Address Book. The Address Book screen appears.

2) Select File, and then select New Directory from the pull-down menu. The Directory Server Property screen appears.

3) Type a descriptive name for your CallPilot directory service, the fully qualified domain name of the CallPilot server, and the search base into the first three boxes.

4) Click OK.

To test the Netscape Messenger IMAP account

Use your telephone to log on to your CallPilot mailbox.

Compose a test voice message and send it to yourself.

For more information, refer to the online Help available from the Help menu within the client.

Configuring Eudora Pro

To change any part of this configuration after it is complete, select Tools from the menu bar on the main screen and click Options to display the configuration screen.

1) Once you complete the new installation of Eudora Pro, select the Eudora Pro icon. The New Account Wizard - Welcome to Eudora Pro! screen appears.

2) Click Next. The New Account Wizard - Account Settings screen appears. If you have another IMAP account for your CallPilot mailbox, you can import the settings. This configuration assumes that the Eudora IMAP account is a new configuration.

3) Under Would you like to:, select Create a brand new e-mail account, and then click Next. The New Account Wizard - Personal Information screen appears.

4) Type your name in the Your Name box, and then click Next. The New Account Wizard - E-Mail Address screen appears.

5) Type your CallPilot mail address in the E-Mail Address box, and then click Next.

   Your e-mail address should be in the form
   <SMTP/VPIM prefix><mailbox number>@<local CallPilot server>.

   Example: 14164067001@voiceuser.factor.com

   where 1416406 is the SMTP/VPIM prefix

   7001 is your CallPilot mailbox number

   voiceuser.factor.com is the fully qualified domain name of the CallPilot server

The New Account Wizard - Logon Name screen appears.

6) Check that the Logon Name box contains the part of your CallPilot mail address to the left of the @ sign, and then click Next. The New Account Wizard - Incoming E-Mail Server screen appears.

7) Check that the Incoming Server box contains the fully qualified domain name of the CallPilot server.

8) Under Please choose whether the server for your incoming mail uses POP or IMAP, choose IMAP, and then click Next. The New Account Wizard - IMAP Location Prefix screen appears.

9) Click Next without entering a location prefix. The New Account Wizard - Outgoing E-Mail Server screen appears.

10) Check that the Outgoing Server box contains the fully qualified domain name of the CallPilot server, and then click Next.

11) Click Finish.

12) Go to the menu bar and select Tools, and then select Options from the pull-down menu.

13) Scroll to the Attachments icon under the Category heading. The Options screen appears.

14) Under Encoding method, select MIME.

15) Scroll to the Styled Text icon under the Category heading.

16) Under When sending mail with styled text (HTML):, select the Send plain text only option.

17) Click OK to save the changes for both the Attachments and the Styled Text screens. The system returns you to the main screen.

To configure an LDAP directory service for Eudora Pro

1) From the menu bar on the main screen, select Tools. Then, from the pull-down menu, click Directory services.

2) Select LDAP in the Protocols box, and then click New Database. The Modify Database screen appears.

3) On the Network tab, type a descriptive name for the CallPilot directory service in the first box, and then type the fully qualified domain name of the CallPilot server in the Host Name box.

4) Select the Search Options tab.

5) If your network is slow, move the slide bar under Search timeout toward Long to increase the timeout.

6) Type the search base for the CallPilot directory in the Search Base box.

7) Click OK. The system returns you to the Directory Services screen.

8) Click the X in the upper right corner of the Directory Services screen to return to the main screen.

To test the Eudora Pro IMAP account

Use your telephone to log on to your CallPilot mailbox.

Compose a test voice message and send it to yourself.

For more information, refer to the online Help available from the Help menu within the client.